

Application Data Sheet

Application Information

Application Type:: Regular
Subject Matter:: Utility
Suggested classification:: N/A
Suggested Group Art Unit:: N/A
CD-ROM or CD-R?:: None
Computer Readable Form (CRF)?:: No
Title:: WEALTH TRANSFER PLAN USING IN KIND
LOAN REPAYMENT WITH TERM
INSURANCE PROTECTION FOR RETURN
OF NOTE
Attorney Docket Number:: 057799-2006
Request for Early Publication?:: No
Request for Non-Publication?:: No
Suggested Drawing Figure:: 1
Total Drawing Sheets:: 3
Small Entity?:: Yes
Petition included?:: No
Secrecy Order in Parent Appl.?:: No

Applicant Information

Applicant Authority Type:: Inventor
Primary Citizenship Country:: US
Status:: Full Capacity
Given Name:: Michael D.

Family Name:: Brown
City of Residence:: Irvine
State or Province of Residence:: CA
Country of Residence:: US
Street of mailing address:: 19 Taggart
City of mailing address:: Irvine
State or Province of mailing address:: CA
Postal or Zip Code of mailing address:: 92612

Correspondence Information

Name:: Bernard L. Kleinke
Street of mailing address:: Foley & Lardner, 402 West Broadway
23rd Floor
City of mailing address:: San Diego
State or Province of mailing address:: California
Postal or Zip Code of mailing address:: 92101-3542
Phone number:: (619) 685-6459
Fax Number:: (619) 234-3510
E-Mail address:: bkleinke@foleylaw.com

Representative Information

Representative Designation::	Registration Number::	Representative Name::
Primary	40,893	WESLEY B. AMES

Primary	44,676	LEI FANG
Primary	45,861	KEVIN J. FORRESTAL
Primary	38,473	ANDREW EDWARD GRANSTON
Primary	39,716	LEE HSU
Primary	22,123	BERNARD L. KLEINKE
Primary	31,192	STEPHEN E. REITER
Primary	45,071	RICHARD M. SAN PIETRO
Primary	34,842	STACY L. TAYLOR
Primary	32,327	RICHARD J. WARBURG
Primary	47,174	ARTHUR A. WELLMAN JR.
Primary	46,230	MICHAEL A. WHITTAKER
Primary	39,431	BARRY S. WILSON

Domestic Priority Information

Application::	Continuity Type::	Parent Application::	Parent Filing Date::

Foreign Priority Information

Country::	Application number::	Filing Date::	Priority Claimed::

Assignee Information

Assignee name::

Spectrum Group Investments, LLC